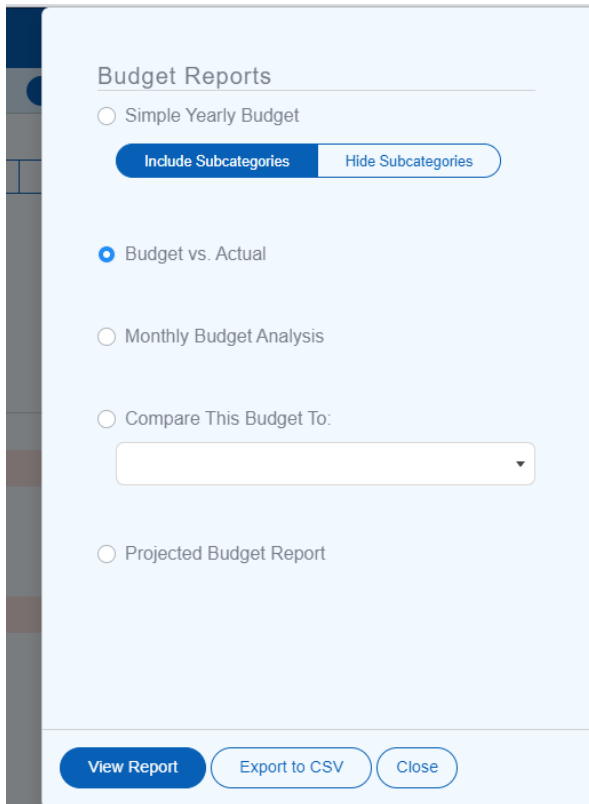


ChurchTrac Budget Report Production Instructions

From ChurchTrac, go to accounting / budgets, select the desired budget and ending date, then from budget reports, choose budget vs actual and press "Export as csv". It will save a file named export.csv (or possibly export(n).csv if one is already present)

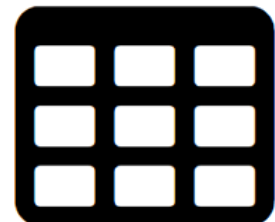
A screenshot of the ChurchTrac 'Budget Reports' interface. The page has a light blue header with the title 'Budget Reports'. Below the header, there are several radio button options: 'Simple Yearly Budget', 'Budget vs. Actual' (which is selected), 'Monthly Budget Analysis', 'Compare This Budget To:', and 'Projected Budget Report'. The 'Compare This Budget To:' option has a dropdown menu below it. Above the 'Budget vs. Actual' option, there are two buttons: 'Include Subcategories' and 'Hide Subcategories'. At the bottom of the interface, there are three buttons: 'View Report', 'Export to CSV', and 'Close'.

Navigate to <https://www.spiritofpeacecommunity.org/tools/>

Spirit of Peace Tools

Budget Report Tool

Html / Javascript based tool for presenting and enhancing ChurchTrac budget reports using the file created by exporting as CSV.



Select Budget Report Tool. It will open in a browser and look something like this. Note that the browser tries to remember the Page Heading and most of the checkboxes that were used in the most recent “(re)Display”.

ChurchTrac Budget Report Tool

This Month No file chosen

Prior Month No file chosen

Page Heading

Highlight ☒ Print Date ☒

Columns

Format

☒ Indent inside
Income/Expense
rows

☒ Indent ".-"
separated names

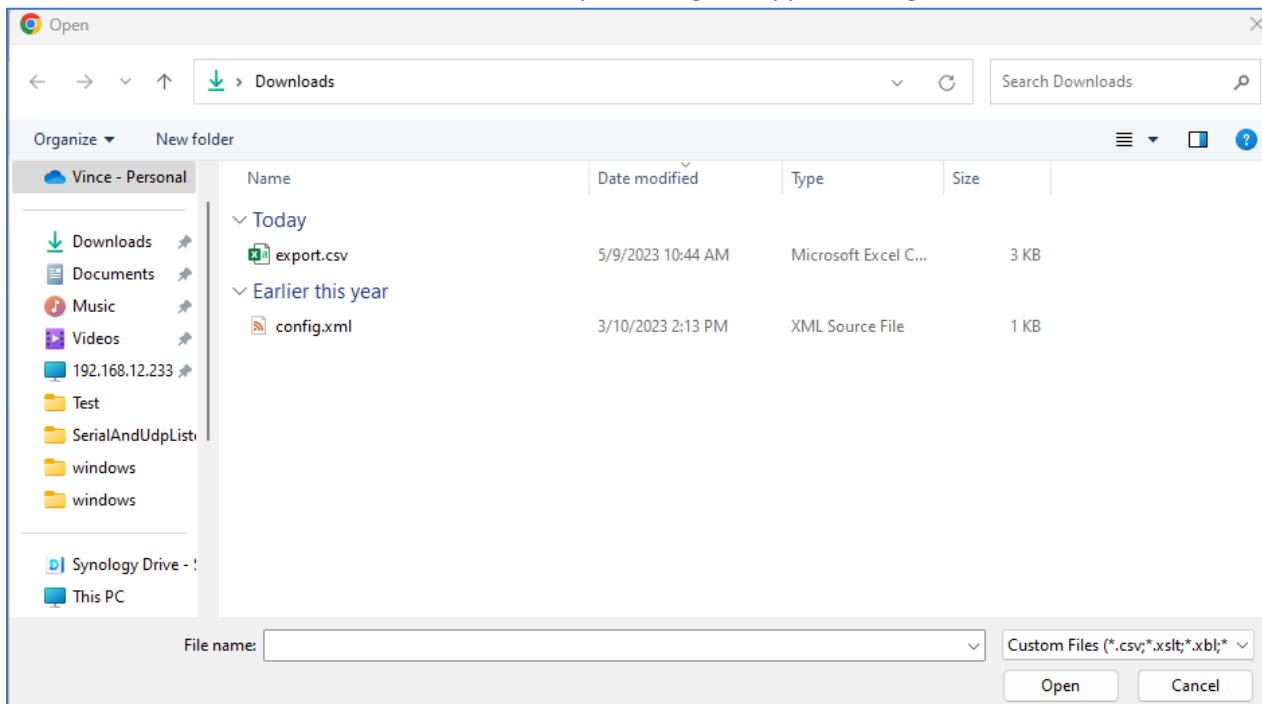
☒ Append
Subtotals

☐ Blank zero
values

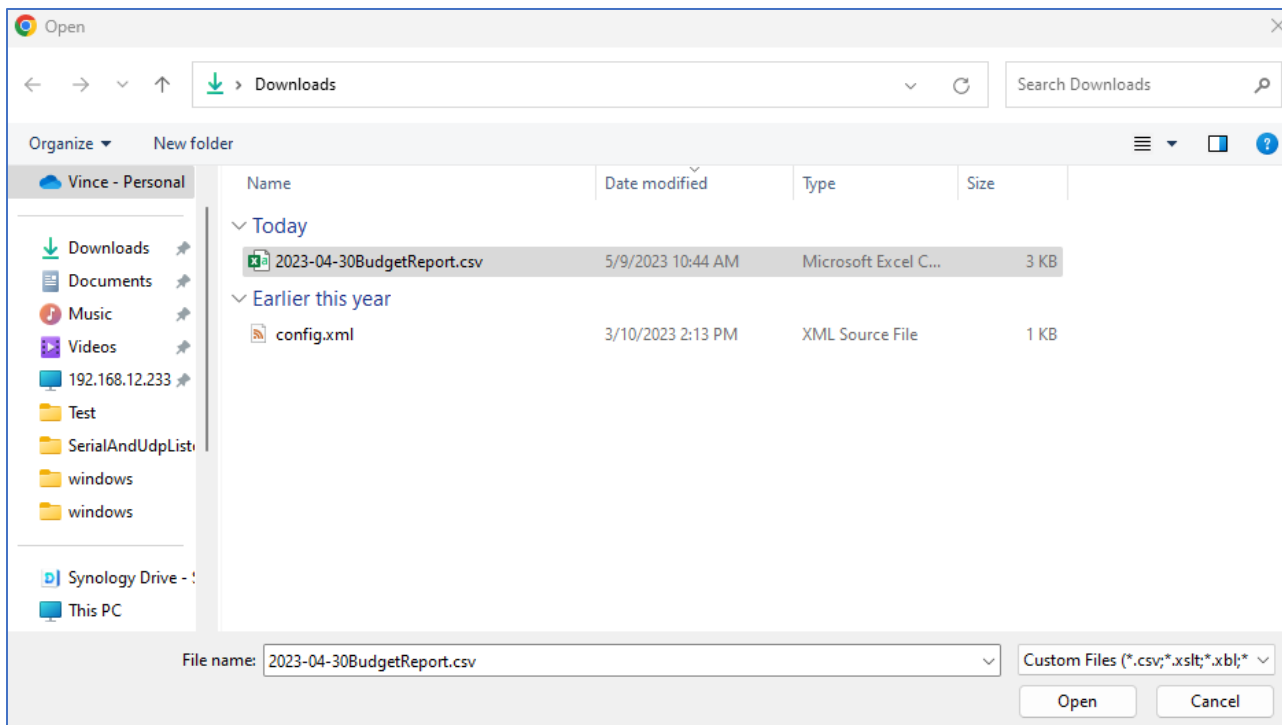
☐ Sort columns

ChurchTrac Budget Report Tool, Revision 1.0

Click “Choose File” for “**This Month**”, and a file open dialog will appear. Navigate to Downloads if not already there



You can rename it from here by right clicking and selecting rename from the context menu.



Rename the file. Our naming convention is yyyy-mm-ddContentName. Note that the report title is derived from the filename, and is intended to allow correlating it to the origin csv file (which should be saved along with other reporting artifacts) Select the renamed file and press “Open”

The report tool display will refresh showing the columns contained in the csv file.

ChurchTrac Budget Report Tool - 2023-04-30 Budget Report

This Month 2023-04-30BudgetReport.csv Prior Month No file chosen

Page Heading Highlight ☒ Print Date ☒

Columns

☒ Category ☒ YTD Budget ☒ YTD Actual ☒ YTD Difference ☒ Annual Budget ☒ Difference

Format ☒ Indent inside Income/Expense rows ☒ Indent ":" separated names ☒ Append Subtotals ☐ Blank zero values ☐ Sort columns

ChurchTrac Budget Report Tool, Revision 1.0

If you want values for the current month, you can do so by clicking “Choose File” for “**Prior Month**”,

ChurchTrac Budget Report Tool - 2023-04-30 Budget Report

This Month	Choose File	2023-04-30BudgetReport.csv	Prior Month	Choose File	2023-04-30BudgetReport.csv
Page Heading			Highlight <input checked="" type="checkbox"/> Print Date <input checked="" type="checkbox"/> Hide Configuration and Print		
Columns					
Select All					
<input checked="" type="checkbox"/> Category	<input checked="" type="checkbox"/> * Current Budget	<input checked="" type="checkbox"/> * Current Actual	<input checked="" type="checkbox"/> * Current Difference	<input checked="" type="checkbox"/> YTD Budget	<input checked="" type="checkbox"/> YTD Actual
<input checked="" type="checkbox"/> Annual Budget	<input checked="" type="checkbox"/> Difference				
Format					
<input checked="" type="checkbox"/> Indent inside Income/Expense rows	<input checked="" type="checkbox"/> Indent ". " separated names	<input checked="" type="checkbox"/> Append Subtotals	<input type="checkbox"/> Blank zero values	<input type="checkbox"/> Sort columns	
(re)Display			ChurchTrac Budget Report Tool, Revision 1.0		

The current month Budget / Actual / Difference columns are now available for the report

Creating Report

- Check the boxes for the columns that you want in the report, and the format features you want to use.
- **Enter a page heading, such as the church name and address.**
- Check the Highlight box to have under-budget income and over-budget expenses highlighted
- Check the Print Date box if you want the printed date in the report
- Press (re)Display to see the report. You may experiment by checking / unchecking various selections and redisplaying using the modified configuration.

Saving PDF version of report

- Press "Hide Configuration and Print" and you will get a print dialog allowing you to print only the report part of what you see.
- **NOTE** the background coloring will only appear in the PDF file if "More Settings->Background Graphics" is check marked.
- Choose the destination "Save as PDF" and press "Save".
- Browse to destination location and specify filename to save.

Other thoughts

- The tool does not rely upon rigid column definitions, so you could, for example open the CSV fie in a CSV editor (such as Excel) and add a comment column containing anomaly explanations for certain rows, and it will be available to display as part of the report.